NATIONAL ENERGY TECHNOLOGY LABORATORY

Clean Cities Coalition Programmatic Support Contract Requirements

Kay Kelly/ Mike Scarpino

Clean Cities Project Manager

Clean Cities

U. S. Department of Energy

Purpose of Support Contracts

- Objective of this effort is to help fund **activities related to validating, collecting, and reporting critical data and performance metrics** that are needed to **track the growth/adoption of petroleum reduction technologies and practices** in the marketplace
- Task 1: Provide support for **Data Collection, Reporting, and Assessment efforts** associated with Clean Cities and petroleum reduction activities in the coalition's area of responsibility
- Task 2: Provide support for **Coalition Technical Assistance and Coalition Activities** associated with the deployment of Clean Cities petroleum reduction technologies and practices

NETL Support Contract

- Leonardo Technologies, Inc. (LTI) is the prime contractor for NETL's new Program and Performance Management (PPM) site support contract
- BCS, Incorporated is a subcontractor to LTI under the PPM contract
- Joan Gaspersic is the Clean Cities PPM Task Lead and is a BCS employee
- Kimberly Nix is the Project Analyst and is an LTI employee

NETL Support Contract: Then & Now

RDS	LTI
Joint venture with 3 partner companies	Prime contractor with subcontractors
Large companies with combined employees of about 100,000	Small business < 100 employees
Joan & Amanda worked for the same company	Joan & Kim work for different companies
Purchase order with a few pages attached	Subcontract document is 44 pages long
Huge financial backing	No cash float
Invoices paid in net 30 days	Invoices paid in about 60 days

Reporting Requirements

- **Use Reporting Requirements Checklist form provided**
- **Submit twice during Period of Performance (POP)**
  - or you can invoice once for the whole period
- **Include attachments as appropriate**
- **Attach all required information and documents to invoice**

Reporting Requirements (cont,)

- Complete Annual Survey
- Respond to periodic data requests from DOE for regional market assessment information (i.e. the Alt Fuel Price Report. **All 4 must be completed**) and other periodic data requests from Program staff
- In Compliance with Annual and/or 5 yr Re-designation process
- Keep regional DOE PMC & Coordinator Council members & apprised of issues, developments, success stories, etc. (**must participate in 4 regional calls per reporting period**)
- Hold/organize **2 stakeholder meetings AND 2 special outreach/training events** per year (2 per period)

Reporting Requirements (cont,)

- Provide AFDC/NREL updates on AFV refueling site openings, closings and status changes (public vs. private, hours, etc.) on an on-going basis.
- **Coordinator** attendance at DOE regional peer exchange, Program Merit Review, National Leadership Peer Exchange or industry conference
- **Complete at least 4 Clean Cities University training courses per reporting period**
- Create an Annual Operating Plan
- Confirm completion of optional activities
  - Establish/update Coalition website
  - Issue Coalition newsletter
  - Organize/hold additional stakeholder meetings/events (2 total from this activity + the 4 total required from the base contract)
  - Conduct dedicated outreach to at least 15 fleets
  - Conduct focused series of 3 half-day workshops

Process for Coordinator Training

- Identify a training class you would like to attend.
- Complete the Training Request Form and send it to your DOE Regional PMC briefly describing the training and explaining why you feel it would be beneficial for you to enroll (NOTE: Do not just send a link. You must also include your justification for why you should be approved to attend).
- Obtain approval on the Training Request Form from your DOE Regional PMC.
- Ensure your Coalition Support contract contains a funding allowance for training attendance. If it does not, please contact Joan Gaspersic (Joan.Gaspersic@bc.netl.doe.gov) or Kimberly Nix (Kimberly.Nix@LT.netl.doe.gov) to amend your contract and attach the Training Request Form approval from your Regional PMC.
- Register for the training course.

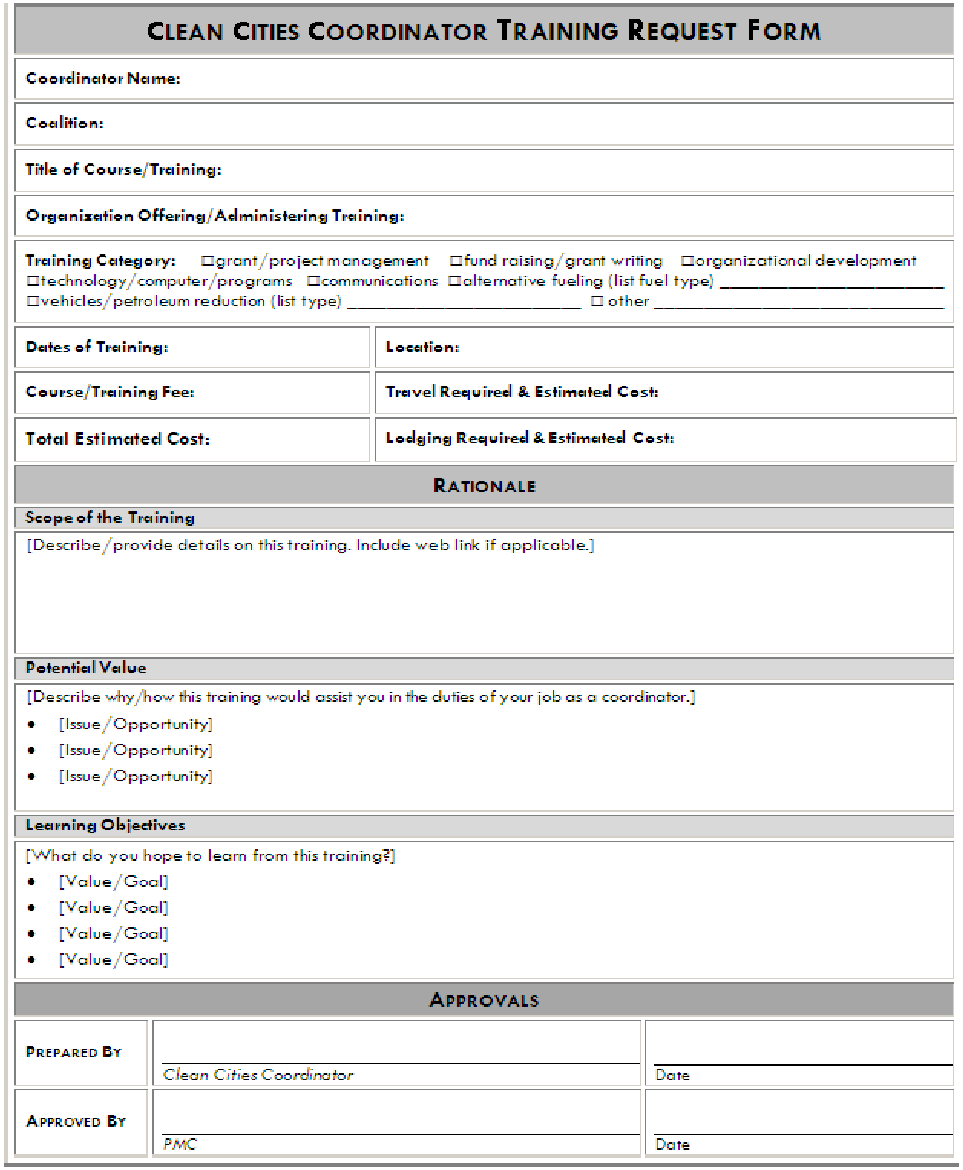
Process for Coordinator Training (cont.)

- (If Traveling) Make a lodging reservation at the government rate. (NOTE: your contract will only reimburse lodging up to the negotiated government rate. Approved lodging rates for different cities can be found at www.gsa.gov under the “per diem” heading.)
- (If Traveling) At least one-week prior to your training class, locate the government travel authorization letter stating that you will be traveling on government business (copies of this letter may be obtained from Joan Gaspersic, Kimberly Nix or your Regional PMC). You will need this verification letter at hotel check-in to ensure that you are granted the government rate for your lodging.
- Attend/take the training class.
- Obtain a certificate of course completion.
- (If traveling) Collect and save all receipts from your trip.
- Complete Training Reimbursement Invoice

Process for Coordinator Training (cont.)

- Send Invoice in accordance with the instructions with all applicable receipts and a copy of your certificate of course completion as soon as possible (no later than 2 weeks after the conclusion of your training course).
- Complete the Training Evaluation Form and send it to your Regional PMC.
- **NOTE: You are limited to invoicing twice per year for training (if you are taking multiple classes)**

Training Request Form



CLEAN CITIES COORDINATOR TRAINING REQUEST FORM

Coordinator Name:	
Coalition:	
Title of Course/Training:	
Organization Offering/Administering Training:	

Training Category: ☐grant/project management ☐fund raising/grant writing ☐organizational development ☐technology/computer/programs ☐communications ☐alternative fueling (list fuel type) ____________ ☐vehicles/petroleum reduction (list type) ____________ ☐ other ____________

Dates of Training:	**Location:**
Course/Training Fee:	**Travel Required & Estimated Cost:**
Total Estimated Cost:	**Lodging Required & Estimated Cost:**

RATIONALE

Scope of the Training

[Describe/provide details on this training. Include web link if applicable.]

Potential Value

[Describe why/how this training would assist you in the duties of your job as a coordinator.]

- [Issue/Opportunity]
- [Issue/Opportunity]
- [Issue/Opportunity]

Learning Objectives

[What do you hope to learn from this training?]

- [Value/Goal]
- [Value/Goal]
- [Value/Goal]
- [Value/Goal]

APPROVALS

PREPARED BY	*Clean Cities Coordinator*	Date
APPROVED BY	PMC	Date

Training Evaluation Form

CLEAN CITIES COORDINATOR TRAINING EVALUATION FORM

Coordinator Name:

Coalition:

Title of Course/Training:

Organization Offering/Administering Training:

Training Category: ☐grant/project management ☐fund raising/grant writing ☐organizational development ☐technology/computer/programs ☐communications ☐alternative fueling (list fuel type) ____________________ ☐vehicles/petroleum reduction (list type) ____________________ ☐ other ____________________

Dates of Training:	**Location:**
Course/Training Fee:	**Travel Required & Cost:**
Total Cost:	**Lodging Required & Cost:**

TRAINING EVALUATION

Scope of the Training

[Describe/provide details on this training. Include web link if applicable.]

General/Overall Evaluation of the Training

Circle One: Thumbs Up or Thumbs Down [Please add additional comments]

Training Benefits/Value

[Describe the key benefits from participating in this training. Include as many as necessary.]

- Was this training a good use of your time?
- Training Evaluation Form ...nticipated learning objective?
- [Benefit]
- [Benefit]

Usefulness/Recommendation

[Would you recommend this training for other coordinators? Why or why not?]

Regular Invoices

- **Fixed price contracts, therefore no receipts required**
- **For FY10 submit two invoices:**
  - November 16, 2009 through April 30, 2010
  - May 1, 2010 through October 31, 2010
- **Important: Please send an electronic copy to ppminv@lti-global.com with cc to Joan and Kim.**
- **Invoices should be submitted within 30 days of end of reporting period.**
- **No hard copies are required.**
- **Attach Reporting Requirements Checklist**
- **Invoices are payable in about 60 days.**

Follow the Money

1. Invoice & report received by 4th of the month
2. Report approved by 8th
3. Costs submitted by LTI to NETL by 15th
4. NETL reimburses LTI 30 days later
5. LTI reimburses coalition within 30 days

Total time elapsed is 60+ days

Plan early & submit invoices before the 4th of the month!

Training Reimbursement Invoices

- **Cost reimbursable, therefore must have receipts**
- **Must include certificate verifying completion of training course**
- **Must include receipts showing amount PAID (not just estimate of cost)**
- **Mileage reimbursed at .50 cents/mile**
- **Hotel rate must be at govt. rate or special approval is needed**
- **Check website for per diem costs in specific cities: www.gsa.gov**
- **No receipts required for misc. expense <$75, such as cab fare, subway fare, road tolls, parking, etc.**

Results to Date

- Funding provided via NETL subcontractor, eliminating need for establishing 90+ separate grants
- Year 1 (FY 07) established 78 contracts for $10,000 each
- Year 2 (FY 08) established 83 contracts for $12,500 each
- Year 3 (FY 09) established 85 contracts for amounts between $15,000 - $20,000
- Year 4 (FY 10) established 75 contracts for amounts between $15,000 - $22,500
- Fund activities such as Regional meetings, Fall Leadership Retreat, Training & other support activities (such as invitational travel)

Lessons Learned From Previous 3 Yrs

- Name and address on Invoice must match Subcontract
- Subcontract number (S???-CCC-PPM4002) and WBS Number (520.03.01.000) must be on invoice
- Joan & Kim must be notified of coordinator, address, or organizational changes so that Subcontract can be modified
- Must include receipts for travel/training and special events/meetings (for cost reimbursable contracts)
- No pre-payment/advance draw down allowed
- Send Reporting Checklist and other attachments with Invoice (i.e. not separately)

Issues - Non-responsiveness

- **Subcontract documents**
  - 30 days after subcontracts were sent out, 62 were returned. That means 25 were still outstanding.
  - 60 days after subcontracts were sent out, another 8 were returned. 17 are still outstanding.
- **Reports & invoices**
  - 14 days after the end of the reporting period only 33 were received
  - LTI is rated on timeliness of deliverables…your lateness impacts LTI!
- If you are running late, please at least respond to let us know what is happening or why dates are delayed.

FY 10/Year 4 Awards & Beyond

- 1st Reporting period ended April 30th. Payments expected in July/August time frame
- 2nd Reporting period ends October 31st. Payments will take place in January/February 2011 timeframe.
- Anticipate issuing FY11 contracts in November 2010.

Contact Information

- **PPM/BCS Project Manager - Joan Gaspersic**
  - Office: 412-386-4933
  - Cell: 410-794-6064
  - Email: joan.gaspersic@bc.netl.doe.gov
- **PPM/LTI Project Analyst - Kimberly Nix**
  - Office: 412-386-7473
  - Cell: 724-554-3678
  - Email: kimberly.nix@lt.netl.doe.gov
- **PMC PPM Contract Project Manager - Mike Scarpino**
  - Office: 412-386-4726
  - Email: michael.scarpino@netl.doe.gov
  - Or any of the other PMC contacts should be able to help you.

Questions ?